

HOWTO: Getting Started With the PCMDI Software Portal

An introduction to the PCMDI Software Portal, including some basic information about the Plone interface and how to accomplish some common tasks.

User Permissions

Before discussing how to go about editing pages, it may be useful to know who can view and edit content, and who has permissions to do various things in this system. We've configured the site such that there are four main user classes (from least to most privilege):

Anonymous User

Has read-only access to a subset of the content in the portal. Is basically restricted to viewing the documentation, message boards, and other public content.

Site Member

Has a portal user account. When logged in, can add comments to the bottom of tutorial pages and post to the message boards. Has a personal folder, but no access to the "Site Contributors" folder.

Site Contributor

Same privileges as Site Member, plus has access to "Site Contributors" folder. This folder contains internal documents, tutorial templates, and other useful information on contributing to the site.

Site Administrator

Access to everything, including the site configuration.

Your Folder

Upon logging in, you will see a link to your folder. Think of this folder as your home directory, where you can create and edit content. You can quickly jump to your folder (when logged-in) via the "my folder" link under the search box.

Editing Content

If you are viewing a page you have permissions to edit, you will see a series of green tabs across the top of the page. The Contents tab presents you with a filesystem-like view. You can add documents and sub-folders, and there is also a set of handy cut-copy-paste buttons for easily moving or duplicating files. The View tab shows you the document or folder as a normal user would see it. The Edit tab (obviously) allows you to edit the content. On the Properties tab, you can modify certain document properties, including a date range for the content to be considered active, a set of associated search keywords, and turning comments on or off for that page (the site default is off). Finally, the Sharing tab associates users with your document, so that you can have fine-grained control over who can view and edit certain content.

Using the Epоз Editor

By default, Plone has three different edit modes: Structured Text, HTML, and Plain Text. A more advanced editor, called Epоз, gives you a WYSIWYG editing interface, as well as allowing you to toggle to view/edit the raw HTML. To use Epоз as your default editor, click the "my preferences" link (under the search bar when logged-in). Choose "Personal Preferences", then select Epоз as your content editor.

File States

A file or folder can be in one of several different states, and that state affects who has access to it. The states we are interested in are Private, Visible, and Published:

Private

Can only be viewed and edited by the owner(s) of that file. You can add owners (in addition to yourself) to grant other users access to that file.

Visible

The default state for new items. Considered hidden because it does not show up in the navigation menu, but still viewable by anyone on the site (even Anonymous Users) if that person knows the URL to access the file or document directly. It will also show up in search results.

Published

Open to the public.